KonsortSWD NFDI4Society	Funding Period: 2025-2028. Information Classification / Access level		
Document name	Onboarding process	**Target Group**	Measure Leads / TA Coordination
Task Area	Advancing FAIRness	**Measure**	2: Findability of Service and Data
Authors	Janete Saldanha Bach	**Milestone**	N/A
Version and Date:	1.0, last updated: 10/10/2025	**DOI**	N/A
Reviewed by	N/A	**Access level**	Internal

Internal: LA - LA Members | ML - Measure Leads | MS - Measure Staff | MS-N - Institute Staff | TA-C - TA Coordination | TA-S -TA Spokesperson |

External: DFG - DFG | GP-General Public | RC-Research Community | TP/S-Third Party / Suppliers

Create an onboarding process

Onboarding Checklist – KonsortSWD Phase II (TA2 Advancing FAIRness)

Target Group: *For new participants and TA coordinators / Measure leads – Step-by-step start guide*

Kick-off Preparation Phase

Understand the TA Structure
- Review the Measures under TA

Initial Actions
- Welcome email, who should be contacted, use the Listservice
  - What information should be there – meetings planned (quarterly, monthly, weekly), what documents will be used (minutes, etc).

- Knowledge management: how to safely preserve the registered information
  - Assign the *information classification*[1] (relevant for Data protection and document management purposes)
  - At a **measure** level (manage access)
  - At the **Task Area** level: Access Shared Coordination Documents (manage access)
    - Save and regularly update the following:
  - Meeting room: tba
  - Meeting planning: https://konsortswd.nextcloud.hosting/s/xj2kDmzGtDEHW3W
  - Presentation: https://konsortswd.nextcloud.hosting/s/ByHQE3z286oRonk

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[1] We would need an **information classification policy**, but the level of access should be a starting point

- o Meeting minutes:
  https://konsortswd.nextcloud.hosting/s/6M7yr5Xk6a5k8dDAt the
  KonsortSWD Level: A shared folder (NextCloud soon) (manage access)
  - ▪ Gather all documentation at the end of the project
    - ▪ https://konsortswd.nextcloud.hosting/s/dEm3W3wRkGoHtT5
- o At **the General Public** Level: Zenodo - Tag Publications (manage access)
  - ▪ Use Zenodo to register your outputs (presentations, reports, datasets).
  - ▪ Assign the correct communities:
    - ▪ KonsortSWD *(existing)*
    - ▪ NFDI *(umbrella consortium)*
    - ▪ **KonsortSWD-II_TA2-FAIRness** *(level of task area/measure)*
    - ▪ Example Measure community from KSWD-I :
      (https://zenodo.org/communities/konsortswd-ta5-m1),
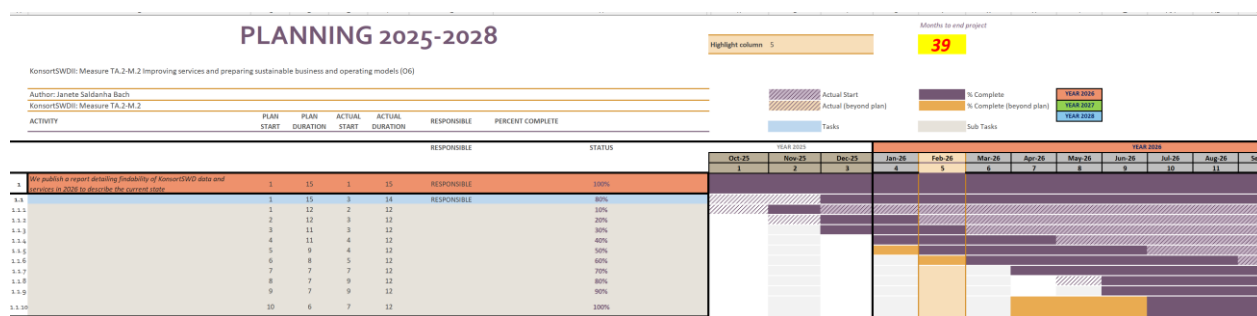
Prepare for the Kick-Off Meeting
- A Doodle poll will be sent to confirm the best date.
- Inform people what they may be asked to present from their Measure's current status.
- Send an ICS and/or Google meeting file attached (here you can set the Reminder pace, not relying only on 15 min. alerts)
- Send the links of useful documents in the invitation email
- Organize minutes with the minimum metadata

Prepare for the follow-up meetings
- Set a fixed date and time or a doodle poll.
- Inform people what they may be asked to present from their Measure's current status.
- Send an ICS and/or Google meeting file attached (here you can set the Reminder pace, not relying only on 15 min. alerts)
- Organize minutes with the minimum metadata:
  - o Useful Links: Meeting planning, Meeting room, Presenting the updates, Meeting minutes
  - o Date and time
  - o Topics: Update, For Discussion, For Action, For Information only

Plan and control the deliverables – level of Measure leaders

- **Plan the deliverables** Bernhard's Spreadsheet

- **Execute for the deliverables follow-up**:
  https://konsortswd.nextcloud.hosting/s/4a3dzQnagnjr2zy

Process Harmonization

Information classification and access level Template

	Funding Period: 2025–2028. Information Classification / Access level		
Document name	Describe the document's purpose	**Target Group**	Measure Leads / TA Coordination
Task Area	Advancing FAIRness	**Measure**	2: Findability of Service and Data
Authors	Xxxxx https://orcid.org/xxxxxxxxx (incl. textual contributions)	**Milestone**	N/A or [Mx] (Report) *Related_item*, available at: https://doi.org/10.5281/zenodo.xxxxx
Version and Date:	1.0, last updated: dd/mm/aaaa	**DOI***	https://doi.org/10.5281/zenodo.xxxxx.
Reviewed by	N/A or – https://orcid.org/xxxxxxxxx (incl. textual contributions)	**Access level**	Internal

* only if access level is Public

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Stakeholders	**Acronym**	**Access level**
Internal		
Institute Staff	MS-N	Internal
Measure Staff	MS	Internal
Measure Leads	ML	Internal / Restricted

Stakeholders	Acronym	Access level
TA Coordination	TA-C	Internal / Restricted
TA Spokesperson	TA-S	Restricted
LA Members	LA	Restricted
External		
DFG	DFG	Restricted
Third Party / Suppliers	TP	Public
Research Community	RC	Public
General Public	GP	Public

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